

North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal Recipient Point of Care User Guide

Version 7

March 10, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

If you are in North Carolina, you can also call the COVID-19 Provider Help Center at (877) 873-6247 and select option 8. The COVID-19 Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code

NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

*For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register:
VAC2021*

3. You will receive an e-mail with your username and temporary password to log into the portal

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Overview

Overview

The screenshot shows the NCDHHS CVMS Provider Portal. The header includes the NCDHHS logo and navigation links: Home, Recipient, Appointments, Slot Management, and Help & Information. A message states 'You are currently logged in as Clinic Location1' with a 'Switch Locations' button. The main content area is divided into two sections: 'Recipient Check-In' and 'Appointment Walk-In'. The 'Recipient Check-In' section has a form for entering an 'Appointment Confirmation Number' with a 'Go' button, and a 'Search Appointments' button. The 'Appointment Walk-In' section has a form for searching by 'Name', 'Date Of Birth', and 'Email', with a 'Search' button. Below the search form is a 'Search Results' table with columns for Name, DOB, Email, Vaccine Group, and Vaccine Dose Status. The table shows one result for 'Space t Test' with DOB '1997-03-17', Email 'rohiniuat@mailinator.com', Vaccine Group 'Group 4', and Vaccine Dose Status 'Dose 1 Scheduled'. An 'Appointment Booking' button is located to the right of the search results. At the bottom, a footer note says 'Please be sure to bookmark this site: https://uat-ncdhhs.cs33.force.com/VaccineProvider'.

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Name	DOB	Email	Vaccine Group	Vaccine Dose Status
Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled

The Recipient Point of Care process typically involves:

1. Verifying the Recipient's identity
2. Creating an Appointment Booking for the Recipient via the Appointment Walk-In Tool
3. Creating a Recipient Record on behalf of a Recipient
4. Completing a COVID-19 Vaccine Registration on behalf of a Recipient

It is important to note that to document a Recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is found in CVMS, and the **COVID-19 Vaccine Registration** form is complete.

This set of activities can be performed by a user with a **HEALTHCARE PROVIDER, HEALTHCARE LOCATION MANAGER, or STATEWIDE LOCATION MANAGER** profile.

You will also need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> using your NCID username and password.

Now, let's get started!

Key Terms



Vaccine Group



Eligibility

Because early supply of the COVID-19 vaccine is limited, **North Carolina has implemented a risk-based prioritization approach** based on guidance from the National Academy of Medicine, the CDC's Advisory Committee Immunization Practice, and the NC Institute of Medicine.

The **NC population is divided into multiple Vaccine Groups based on an individual's occupation, medical history, and age.**

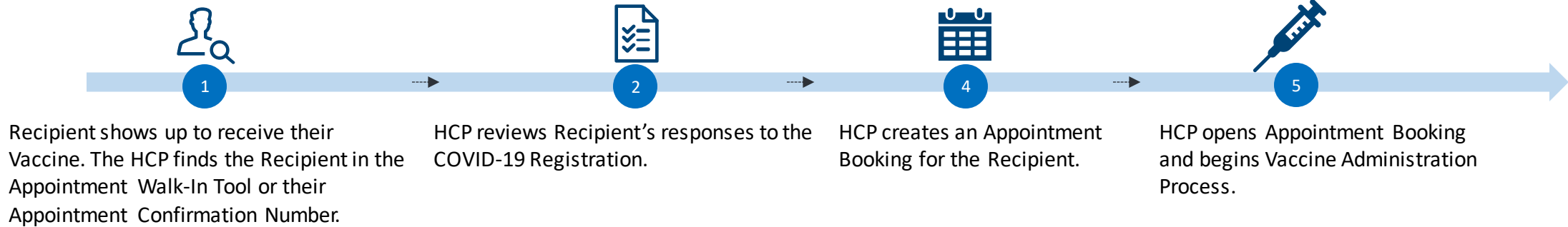
Note: Eligibility requirements may be adjusted in the future by the NC Immunization Branch.

A Recipient's **Eligibility is determined by the Vaccine Group they fall under** as determined by the NC Immunization Branch. If the Vaccine Group is active for vaccination, then the recipient will be eligible.

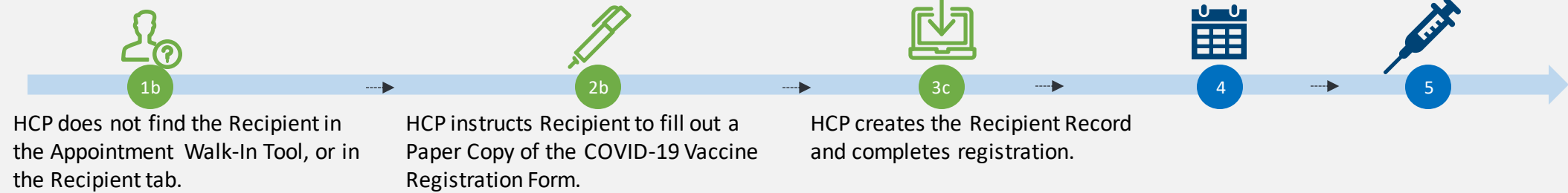
Visit <https://covid19.ncdhhs.gov/findyourspace> for the latest information on Vaccine Groups and eligibility.

Appointment Walk-In Booking Process

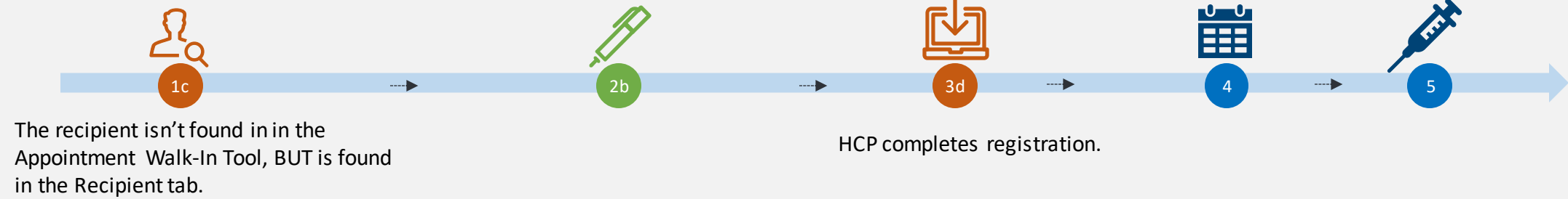
Standard Appointment Walk-in Booking – Recipient Already Registered on COVID-19 Vaccine Portal



Exception 1 – What if the Recipient Record is not yet Created?




Exception 2 – What if the Recipient Record is Created, but Recipient did not Complete Registration?



Standard Point of Care Walk-in Appointment: Recipient is Registered in COVID-19 Vaccine Portal

Step 1 of 6: Navigate to the CVMS Provider Portal Home Page

From the **HOME PAGE**, you will complete a simple **SEARCH** using the **APPOINTMENT WALK-IN TOOL** on your home page before the Recipient receives the COVID-19 vaccine.



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group :	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

If you have access to multiple locations in CVMS, be sure to look at the location you listed as operating in by looking at the top left of the screen under the Tabs bar. If you need to change the location to match where you are operating for the day, select the **SWITCH LOCATIONS** button and choose the applicable location.

Step 2 of 6: Search for the Recipient

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Walkin Example

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

To get started, you will search for the **RECIPIENT** to help you **VERIFY IDENTITY** before creating their appointment.

1. Enter the Recipient's **NAME, DATE OF BIRTH** and / or **EMAIL ADDRESS** in the Appointment Walk-in Tool located on the Home Page
2. Only one field is required to search
3. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

To narrow your Recipient search results, you can enter all search fields to help you find the Recipient faster.

*Note: to document a Recipient Vaccine Administration in CVMS, the recipient **MUST BE** registered in CVMS. Registered in CVMS means the Recipient Record is created, and the COVID-19 Registration form is complete.*

*Although the Recipient's Vaccine Group status is determined by the recipient's self attestation, **the HCP can use its discretion** to administer a COVID-19 vaccine to any recipient they determine is eligible in accordance with the CDC and NCDHHS prioritization of COVID-19 vaccine recipients.*

Step 3 of 6: Review Recipient's Information

After clicking search, you will see your **RECIPIENT SEARCH RESULTS** populate underneath the Appointment Walk-In Tool. You will be able to view the Recipient's **NAME, DATE OF BIRTH (DOB), EMAIL, VACCINE GROUP,** and **VACCINE DOSE STATUS.**


Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD



Email

Search

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group	Vaccine Dose Status
<input type="radio"/> Walkin Example	1966-12-12	walkinexample@mailinator.com	Group 3	Registered

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

VACCINE DOSE STATUS indicates where a Recipient is in their progress toward being vaccinated. Possible statuses include:

- REGISTERED
- DOSE 1 SCHEDULED
- DOSE 1 ADMINISTERED
- DOSE 2 SCHEDULED
- DOSE 2 ADMINISTERED
- DOSE 1 CANCELLED
- DOSE 2 CANCELLED

Step 4 of 6: Verify the Recipient's Vaccine Group

On the same page, you can also confirm the **RECIPIENT'S VACCINE GROUP**. If a Recipient's Vaccine Group is actively being vaccinated, it means the Recipient is currently eligible to **RECEIVE THE COVID-19 VACCINE**. However, if the Recipient's Vaccine Group is **NOT ACTIVE**, the system will still allow you to create an **APPOINTMENT BOOKING** for that Recipient.

Once you confirm the Recipient is eligible to receive the COVID-19 vaccine, you will be able to continue creating the appointment booking for the Recipient.

- 1. Locate **VACCINE GROUP** for the Recipient
- 2. Confirm that Vaccine Group is **ACTIVE**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Check <https://covid19.ncdhhs.gov/vaccines/find-your-spot-take-your-shot> to see which groups are actively being vaccinated.

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group	Vaccine Dose Status
<input checked="" type="radio"/> Walkin Example	1966-12-12	walkinexample@mailin:	Group 3	Registered
			Group 2	
			Group 2	

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Step 5 of 6: Create the Appointment Booking

Once you verified the Recipient’s record and Vaccine Group, you can officially **CREATE THEIR APPOINTMENT BOOKING**.

- 1. In your **SEARCH RESULTS**, select the **CORRECT RECIPIENT RECORD**
- 2. Click **APPOINTMENT BOOKING**
- 3. A message confirming the appointment booking was created will appear
- 4. Click **OK**

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Confirm the Recipient’s Vaccine Group before booking the appointment.

Search Results

Appointment Booking


Name	DOB	Email	Vaccine Group	Vaccine Dose Status
<input checked="" type="radio"/> Walkin Example	1966-12-12	walkinexample@mailinator.com	Group 3	Registered

Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Step 6 of 6: Review the Appointment Booking

The appointment that is created will be available to you under **TODAY'S APPOINTMENTS**.

To begin the **VACCINE ADMINISTRATION** process, the Recipient will require an **APPOINTMENT BOOKING** or **APPOINTMENT CONFIRMATION NUMBER**..



HomeRecipientAppointmentsHelp & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 03, 21, 03:18 PM	Walkin Example Dose 1 Scheduled	03045380	Clinic Location1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

+ To know more about the **VACCINE ADMINISTRATION** process, please reference the CVMS Provider Portal Vaccine Administration User Guide.

Exception 1: Recipient Record is not yet Created in CVMS

Step 1 of 9: Navigate to the CVMS Provider Portal Home Page

- 1. From the **HOME PAGE**, enter the Recipient's name in the **APPOINTMENT WALK-IN TOOL**
- 2. If the Recipient's record does not appear, this means that the Recipient is either not registered or does not have a record

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Jon NewRecipient

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

No search results found or User's Eligibility is not Approved.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 1 Scheduled	00111942	Clinic ABC Loc 1

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Step 2 of 9: Search for the Recipient Record

To see if the Recipient has a record, but is not yet registered, search for them in the **RECIPIENT** tab.

- 1. Navigate to the **RECIPIENT** tab
- 2. Enter the Recipient’s **NAME** (first name and last name) in the search bar
- 3. To help narrow results, enter the Recipient’s **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)
- 4. Click **SEARCH**

[Home](#) [Recipient](#) [Appointments](#) [Help & Information](#)

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Create New Recipient

Recipients within CVMS

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Group	Recipient Dose St...	Email
------------	-------------	-----------	---------------	--------	---------------	----------------------	-------

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
------------	-----------	---------------	--------	-------------

No results, please search again.

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Enter at least three characters to receive results.

A Vaccine Administration cannot be documented in CVMS if the Recipient is not registered in CVMS.

Registration is complete when a Recipient’s answers to the **COVID-19 Vaccine Registration** form are entered into CVMS. This can occur in the **COVID-19 VACCINE PORTAL** or the **CVMS PROVIDER PORTAL**.

Step 3 of 9: Search for the Recipient Record

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in either the **RECIPIENTS WITHIN CVMS** section, or the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section

If there are **NO** results in the **RECIPIENTS WITHIN CVMS** section, or the **CORRECT** Recipient cannot be found, this indicates that the Recipient does not have a record in CVMS, and must be created on-site

Audience


Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

For more information on how to handle Recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section, please see the **WHAT IF THE RECIPIENT RECEIVED THEIR FIRST DOSE THROUGH A PARTNERING PHARMACY** portion of this User Guide.



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Jon NewRecipient

Date of Birth (optional), MM/DD/YYYY

Search

1 Recipients within CVMS

First Name	Middle Name	Last Name	Date of Birth	Gender	Vaccine Group	Recipient Dose St...	Email

1 Recipients from Long Term Care Facilities

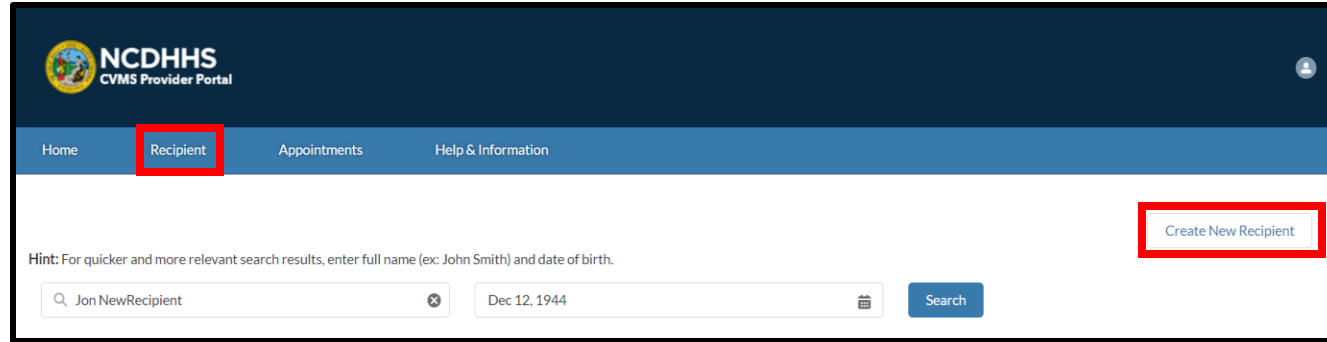
First Name	Last Name	Date of Birth	Gender	Dose Number

No results, please search again.

Step 4 of 9: Ask the recipient to answer the COVID-19 Vaccine Registration Form

OPTION 1 – Register the Recipient by filling out the COVID-19 Vaccine Registration form with the Recipient

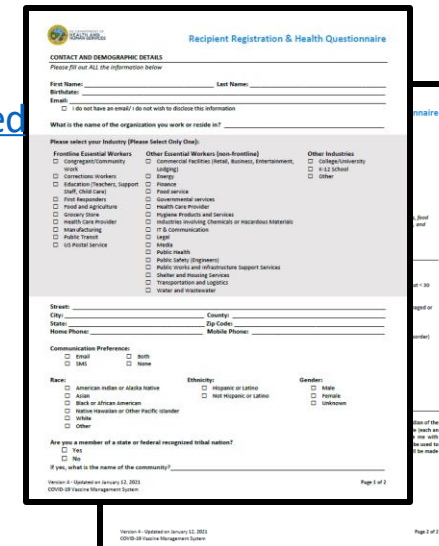
1. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form, read the questions and type the recipient's answers



The screenshot shows the NCDHHS CVMS Provider Portal interface. The 'Recipient' tab is highlighted in the top navigation bar. Below the navigation bar, there is a search bar with a hint: 'Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.' The search bar contains the text 'Jon NewRecipient' and a date 'Dec 12, 1944'. A blue 'Search' button is to the right of the search bar. In the top right corner, there is a button labeled 'Create New Recipient' which is highlighted with a red box.

OPTION 2 – Ask the Recipient to answer the questions on a Paper Copy

1. Instruct the Recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NC Immunization Branch website at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) labeled as **RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM** (in English and Spanish))
2. Give the Recipient a few minutes to fill the form
3. Click the **CREATE NEW RECIPIENT** button on the **RECIPIENT** tab to bring up a pop-up form



The screenshot shows the 'Recipient Registration & Health Questionnaire' form. The form is titled 'Recipient Registration & Health Questionnaire' and includes sections for 'CONTACT AND DEMOGRAPHIC DETAILS', 'Please select your industry (Please Select Only One)', 'Please select your ethnicity (Please Select Only One)', 'Please select your gender (Please Select Only One)', and 'Please select your race (Please Select Only One)'. The form is divided into two columns for 'Please select your industry' and 'Please select your ethnicity'. The form is titled 'Recipient Registration & Health Questionnaire' and includes sections for 'CONTACT AND DEMOGRAPHIC DETAILS', 'Please select your industry (Please Select Only One)', 'Please select your ethnicity (Please Select Only One)', 'Please select your gender (Please Select Only One)', and 'Please select your race (Please Select Only One)'. The form is divided into two columns for 'Please select your industry' and 'Please select your ethnicity'.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand to provide Recipients.

Step 5 of 9: Create the Recipient Record

Create New Recipient

* First Name

Jon

* Last Name

NewRecipient

Email

jon.newrecipient@mailinator.com

No Email Provided

☐

* Birthdate (MM/DD/YYYY)

Dec 12, 1944

Cancel

Create Recipient

Use the Recipient's **COVID-19 Vaccine Registration paper form** to fill in required fields

1. If the recipient cannot provide an email address, select the **NO EMAIL PROVIDED** checkbox. Please inform the recipient that in the absence of an email address, it will not be possible for them to connect to the COVID-19 Vaccine Portal and view their digital Proof of Vaccination. You can however access this from the CVMS Provider Portal and print it for them if needed
2. Enter **BIRTHDATE**
3. Select **CREATE RECIPIENT**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Reference section

Understanding How Recipient Eligibility Status is Determined for more details on Vaccine Groups.

If the recipient is **retired** or **unemployed**, do not select an Employer, and select **OTHER** in **INDUSTRY** field.

Step 6 of 9: Begin the Recipient's COVID-19 Vaccine Registration

Once the Recipient is created, a new browser tab will open for you to fill out the Recipient's **COVID-19 Vaccine Registration** form using the paper copy the Recipient filled out.

- 1. Check the box to confirm that the Recipient has completed the certification statement
- 2. Click **NEXT**

Home Recipient Appointments Help & Information

Vaccine Registration for: Jon NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

COVID-19 Vaccine Registration

Please complete the registration form to determine which vaccine group you are in. The form will take less than 10 minutes to complete.

☒ I certify that I am: (a) at least 18 years of age (b) the parent or legal guardian of the minor patient; or (c) the legal guardian of the patient. Further, I hereby give my consent to the licensed healthcare provider administering the vaccine, as applicable (each an "applicable Provider"), to share my personal, demographic and health condition information in order to provide me with vaccination services for the COVID-19 vaccine. I understand that the health information shared within this questionnaire will be used to determine my eligibility for receiving the COVID-19 vaccination and further determine timing of when the vaccine will be made available to me.

Information about your COVID-19 vaccination is carefully managed to protect your privacy. Your immunization information will not be shared except in accordance with state and federal law. The immunization information collected is similar to the information that is required when you go to the doctor's office or a pharmacy for vaccination, including your name, address, and date of birth. Once you receive the vaccine, it will collect the location where the vaccine was given, when the vaccine was given, the person who administered the vaccine, information about the specific vaccine vial (expiration date, vaccine identifier number, etc.), and how the vaccine was given (e.g., in the muscle of the right arm). NC also collects information about race and ethnicity to make sure everyone has access to vaccines. To meet federal requirements established by the U.S. Centers for Disease Control and Prevention (CDC) and in accordance with NC state law, NC is currently submitting the vaccine recipient's year of birth (not the date of birth), the first 3 digits of the vaccine recipient's zip code of residence (if the underlying population in that zip code includes more than 20,000 people), and the date of submission of the vaccination record. More information about federal CDC data requirements is available at: <https://www.cdc.gov/vaccines/covid-19/reporting/requirements/index.html>

Next

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Step 7 of 9: Enter the Recipient's Demographic Information and Vaccine Group

- 1. Enter the Recipient's demographic information entered by the Recipient on **COVID-19 Vaccine Registration form**
 - 2. Select the appropriate Vaccine Group
- Note:** To determine Vaccine Group, click the hyperlink (<https://findmygroup.nc.gov>) and follow the prompts
- 3. Click **NEXT**

Vaccine Registration for: Jon NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Please provide the information below. Items with a * are required.

* First Name :

Jon

* Last Name :

NewRecipient

* Address :

123 Main Street

* City :

Raleigh

* County :

Wake

* State :

North Carolina

* Zip Code :

12345

Email :

Jon.newrecipient@mailinator.com

Home Phone :

Mobile Phone :

* The best way to contact you :

None

* Date of Birth (MM/DD/YYYY)

Dec 12, 1944

* Race :

White

* Ethnicity :

Not Hispanic or Latino

* Gender :

Male

* What is your Vaccine Group as defined by the following criteria?

Group 3

<https://findmygroup.nc.gov/>

NCDHHS

Find My Vaccine Group

English

Based on your responses, you are in **Group 3: Additional Frontline Essential Workers**. You are currently eligible to get a vaccine based on North Carolina's COVID-19 Vaccination Plan.

However, not all vaccine providers may be ready to vaccinate your group yet. Find local vaccine providers at [MySpot.nc.gov](https://myspot.nc.gov) and contact providers to find out which groups they are currently vaccinating. Remember: you have a spot to take your shot. Vaccines will be available to all who want it, but supplies are currently limited. You may have to wait.

Visit YourSpotYourShot.nc.gov for more information about vaccines. **To receive updates about COVID-19 vaccinations, please provide your email address and/or phone number.**

Next

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

The **FIND MY VACCINE GROUP** tool will guide you / Recipients through a series of questions that will determine which group to mark in the COVID-19 Vaccine Registration form.

Step 8 of 9: Submit the Recipient's Information

Review the information you entered from the paper copy of the **COVID-19 Vaccine Registration form**.

- 1. Validate that the information entered matches the information given by the Recipient
- 2. To make changes, select **PREVIOUS**
- 3. If the information is correct, select **SUBMIT**

Home Recipient Appointments Help & Information

Vaccine Registration for: Jon NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

[Confirm and submit to enroll](#)

Please review the information below and confirm that it is correct. Click submit to complete your registration.

Background Information

First Name : Jon

Last Name : NewRecipient

Address : 123 Main Street

City : Raleigh

County : Wake

State : North Carolina

Zip Code : 12345

Email : jon.newrecipient@mailinator.com

Home Phone :

Mobile Phone :

The best way to contact you : None

Date of Birth (MM/DD/YYYY) 12/12/1944

Race : White

Ethnicity : Not Hispanic or Latino

Gender : Male

Vaccine Group Group 3

Previous

Submit

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If you have any questions about what a Recipient wrote, ask them for clarification before submitting.

Step 9 of 9: Verify the Recipient's Registration

- 1. The **REGISTRATION IS COMPLETE**
- 2. The Recipient's **VACCINE GROUP** will be visible on the Recipient tab as well as on the Recipient's record

Vaccine Registration for: Jon NewRecipient

Introduction

Contact and Demographic Detail

Confirmation

Your registration is complete

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at [YourSpotYourShot.NC.Gov](#).

Home Recipient Appointments Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Jon NewRecipient

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group	Recipient Dose Status	Email
Jon	NewRecipient	Dec 12, 1944	Male	Group 3	Registered	jon.newrecipient@mailinat...

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or edit the registration information in the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the Recipient has been registered successfully, you can return to the **HOME** page and follow the Standard **APPOINTMENT WALK-IN** Booking process.



Home

Recipient

Appointments

Slot Management

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Date Of Birth

YYYY-MM-DD

Email

Search

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group :	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled


Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NC DEPARTMENT OF
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Exception 2: Recipient Record is Created in CVMS, but Recipient did not Complete Registration

Step 1 of 7: Navigate to the CVMS Provider Portal Home Page

The process to register an existing Recipient begins on the **HOME PAGE**. You will verify that the Recipient's name does not appear in the **APPOINTMENT WALK-IN TOOL**. Similar to the previous scenario, this means that the Recipient is either not registered or does not have a record.

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Jill NotRegistered

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

No search results found or User's Eligibility is not Approved.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile


Tips

If the Recipient does appear in the **APPOINTMENT WALK--IN TOOL**, refer to the **RECIPIENT APPOINTMENT BOOKING** section of this User Guide.

Step 2 of 7: Search for the Recipient

To check for the Recipient’s record, search for them in the **RECIPIENT** tab.

- 1. Navigate to the **RECIPIENT** tab
- 2. Enter the Recipient’s **NAME** (first name and last name) in the search bar
- 3. To help narrow results, enter the Recipient’s **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)
- 4. Click **SEARCH**



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q Jill NotRegistered

Optional Date of Birth

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Eligibility Stat...	Priority	Recipient Dos...	Email
Jill	NotRegistered	Dec 11, 1945					

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
------------	-----------	---------------	--------	-------------

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips


You will not be able to log a Recipient vaccine administration if the Recipient is not registered in CVMS.

Registration is complete when a Recipient’s answers to the COVID-19 Vaccine Registration form are entered into CVMS.

Step 3 of 7: Verify the Recipient's Registration

After clicking search, the **RECIPIENT SEARCH RESULTS** will populate in the **RECIPIENTS WITHIN CVMS** section. You will be able to verify that the Recipient has a record but is not yet registered.

- 1. Click on the Recipient's **NAME** to open the Recipient's record
- 2. Verify that the Recipient is not yet registered by confirming their **RECIPIENT DOSE STATUS** is blank
- 3. If the Recipient is not yet registered, select the **REGISTER** button




NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

 Person Account
Jill NotRegistered

Register

Eligibility Status

Priority

Recipient Dose Status

DETAILS

RELATED

Account Name

Jill NotRegistered

Birthdate

12/11/1945

Gender

Ethnicity

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

For more information on how to handle Recipient search results that appear in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section , please see the **WHAT IF A RECIPIENT RECEIVED THEIR FIRST DOSE THROUGH A LONG-TERM CARE FACILITY** portion of this User Guide.

Step 4 of 7: Enter the Recipient's Demographic Information

Just as when registering a new Recipient, a new browser tab will open for you to fill out the Recipient's **COVID-19 Vaccine Registration form**.

1. Instruct the Recipient to fill out a paper copy of the COVID-19 Vaccine Registration form (the PDF file is available under the **HELP & INFORMATION TAB** or on the NC Immunization Branch website at [CVMS User Guides, Recorded Trainings and Upcoming Trainings | NC DHHS COVID-19](#) labeled as **RECIPIENT REGISTRATION AND COVID-19 VACCINE ADMINISTRATION FORM** (in English and Spanish))
2. Click **NEXT**
3. Enter demographic information from the paper copy of the **COVID-19 Vaccine Registration form**
4. If anything is unclear on the paper copy, ask the Recipient for clarification before entering the information into the COVID-19 Vaccine Registration form
5. Click **NEXT**

Introduction Contact and Demographic Detail Confirmation

COVID-19 Vaccination Registration

Please complete the registration form to determine which vaccine group you are in. The form will take less than 10 minutes to complete.

☒ I certify that I am: (a) at least 18 years of age (b) the parent or legal guardian of the minor patient; or (c) the legal guardian of the patient. Further, I hereby give my consent to the licensed healthcare provider administering the vaccine, as applicable (each an "applicable Provider"), to share my personal, demographic and health condition information in order to provide me with vaccination services for the COVID-19 vaccine. I understand that the health information shared within this questionnaire will be used to determine my eligibility for receiving the COVID-19 vaccination and further determine timing of when the vaccine will be made available to me.

Information about your COVID-19 vaccination is carefully managed to protect your privacy. Your immunization information will not be shared except in accordance with state and federal law. The immunization information collected is similar to the information that is required when you go to the doctor's office or a pharmacy for vaccination, including your name, address, and date of birth. Once you receive the vaccine, it will collect the location where the vaccine was given, when the vaccine was given, the person who administered the vaccine, information about the specific vaccine vial (expiration date, vaccine identifier number, etc.), and how the vaccine was given (e.g., in the muscle of the right arm). NC also collects information about race and ethnicity to make sure everyone has access to vaccines. To meet federal requirements established by the U.S. Centers for Disease Control and Prevention (CDC) and in accordance with NC state law, NC is currently submitting the vaccine recipient's year of birth (not the date of birth), the first 3 digits of the vaccine recipient's zip code of residence (if the underlying population in that zip code includes more than 20,000 people), and the date of submission of the vaccination record. More information about federal CDC data requirements is available at: <https://www.cdc.gov/vaccines/covid-19/reporting/requirements/index.html>

Next

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

Print several copies of the **COVID-19 Vaccine Registration form** to keep on hand for other Recipients.

Step 5 of 7: Enter the Recipient's Medical Information

1. Enter the Recipient's demographic information entered by the Recipient on **COVID-19 Vaccine Registration form**
2. Select the appropriate Vaccine Group

Note: To determine Vaccine Group, click the hyperlink (<https://findmygroup.nc.gov>) and follow the prompts

- ### 3. Click **NEXT**

NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Vaccine Registration for: Jill NotRegistered

Introduction

Contact and Demographic Detail

Confirmation

Please provide the information below. Items with a * are required.

* First Name :

* Last Name :

* Address :

* City :

* County :

* State :

* Zip Code :

Email :

Home Phone :

Mobile Phone :

* Date of Birth (MM/DD/YYYY)

* Race :

* Ethnicity :

* The best way to contact you:
☐ None
☒ Home
☐ Cell
☐ Work

* Gender :

* What is your Vaccine Group as defined by the following criteria?

<https://findmygroup.nc.gov/>

NCDHHS

Find My Vaccine Group

English

Based on your responses, you are in **Group 3: Additional Frontline Essential Workers**. You are currently eligible to get a vaccine based on North Carolina's COVID-19 Vaccination Plan.

However, not all vaccine providers may be ready to vaccinate your group yet. Find local vaccine providers at [MySpot.nc.gov](#) and contact providers to find out which groups they are currently vaccinating. Remember: you have a spot to take your shot. Vaccines will be available to all who want it, but supplies are currently limited. You may have to wait.
Visit [YourSpotYourShot.nc.gov](#) for more information about vaccines. **To receive updates about COVID-19 vaccinations, please provide your email address and/or phone number.**

Next

Audience

**Healthcare
Provider**

Healthcare Location Manager

Statewide Location Manager Profile

Tips

The **FIND MY VACCINE GROUP** tool will guide you / Recipients through a series of questions that will determine which group to mark in the COVID-19 Vaccine Registration form.

Step 6 of 7: Submit the Recipient's Information

Review the information you entered from the paper copy of the Recipient's **COVID-19 Vaccine Registration form**.

- 1. Review that the information entered matches the information given by the Recipient
- 2. To make changes, select **PREVIOUS**
- 3. If the information is correct, select **SUBMIT**

The screenshot shows the 'NCDHHS CVMS Provider Portal' interface. At the top, there's a navigation bar with 'Home', 'Recipient', 'Appointments', and 'Help & Information'. Below this, a header indicates 'Vaccine Registration for: Jill NotRegistered'. A progress bar shows three steps: 'Introduction', 'Contact and Demographic Detail' (which is the current step), and 'Confirmation'. A blue link 'Confirm and submit to enroll' is present. Below this, a message says 'Please review the information below and confirm that it is correct. Click submit to complete your registration.' The 'Background Information' section lists the following details: First Name: Jill, Last Name: NotRegistered, Address: 123 Main Street, City: Raleigh, County: Wake, State: North Carolina, Zip Code: 12345, Email: jill@mailinator.com, Home Phone: , Mobile Phone: , The best way to contact you: None, Date of Birth (MM/DD/YYYY): 1/1/1988, Race: Black or African American, Ethnicity: Not Hispanic or Latino, Gender: Female, and Vaccine Group: Group 3. At the bottom, there are 'Previous' and 'Submit' buttons.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Tips

If you have any questions about what a Recipient wrote, ask them for clarification before submitting.

Step 7 of 7: Verify the Recipient's Registration

- 1. The **REGISTRATION IS COMPLETE**
- 2. The Recipient's **VACCINE GROUP** will be visible on the Recipient tab as well as on the Recipient's record

Vaccine Registration for: Jill NotRegistered

Introduction

Contact and Demographic Detail

Confirmation

Your registration is complete

Thank you for completing the registration process. Please remember that registration does not mean that you are currently eligible to be vaccinated or that you have an appointment. A free COVID-19 vaccine will be available to all who want it, but supplies are currently limited. Get accurate information about COVID-19 vaccines at [YourSpotYourShot.NC.Gov](#).

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q Jill NotRegistered

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group :	Recipient Dose Status	Email
Jill	NotRegistered	Jan 1, 1988	Female	Group 3	Registered	jill@mailinator.com

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL** or edit the registration information through the CVMS Provider Portal.

Finalize Walk-In Appointment Booking

Now that the recipient has been registered successfully, you can return to the **HOME** page and follow the standard **APPOINTMENT WALK-IN** Booking process.



[Home](#) [Recipient](#) [Appointments](#) [Slot Management](#) [Help & Information](#)

You are currently logged in as Clinic Location1

[Switch Locations](#)

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

[Go](#)

No Appointment Confirmation Number?

[Search Appointments](#)

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Space Test

YYYY-MM-DD

Search Email

[Search](#)

Search Results

[Appointment Booking](#)

Name	DOB	Email	Vaccine Group :	Vaccine Dose Status
<input type="radio"/> Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled


Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NC DEPARTMENT OF
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HUMAN SERVICES


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Editing Recipient Registration Record Details

Step 1 of 4: Navigate to the CVMS Provider Portal Recipient Tab

In some instances, a Recipient may need to edit the information on their COVID-19 Vaccine Registration form. To do so, navigate to the Recipient Tab.





Home **Recipient** Appointments Bulk Registration Reports Vaccine Inventory More ▾

You are currently logged in as Clinic ABC Loc 1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Feb 09, 21, 09:30 AM	John3 Deere3 Dose 1 Scheduled	00112756	Clinic ABC Loc 1
Feb 09, 21, 04:39 PM	reji11 ayod11 Dose 1 Scheduled	00112837	Clinic ABC Loc 1
Feb 09, 21, 04:47 PM	reji12 ayod12 Dose 2 Scheduled	00112842	Clinic ABC Loc 1

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile

Step 2 of 4: Search for the Recipient


- 1. Enter the Recipient’s **NAME** (first name and last name) in the search bar for the Recipient who needs their COVID-19 Vaccine Registration form updated
- 2. To help narrow results, enter the Recipient’s **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)
- 3. Click **SEARCH**
- 4. Click on the desired Recipient from your search results

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

Only select a Recipient record that populates in the **RECIPIENTS WITHIN CVMS** section of your search results



Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q Edit Questionnaire

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group :	Recipient Dose Status	Email
Edit	Questionnaire	Jan 1, 1994	Male	Group 5	Registered	editquestionnaire@mailina...

Step 3 of 4: Edit the Recipient

- 1. From the Recipient record, click the pencil icon next to the field you need to edit
- 2. Make any necessary changes (fields where you've made a change will be highlighted in **YELLOW**)
- 3. Click **SAVE**

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

Person Account

Edit Questionnaire

Eligibility Status

Priority

Recipient Dose Status

Not Approved

Group 5

Registered

DETAILS

RELATED

Account Name

Edit Questionnaire

Gender

Male

Race

White

Medical Health Conditions

None

Employer

Priority

Group 5

Vaccination Status

Registered

Birthdate

1/1/1994

Ethnicity

Not Hispanic or Latino

Industry

Other / Not Applicable

Do you identify as any of the following?

Resident of Long Term Care Facility

Recipient Dose Status

Registered

Risk Level

Low

Recipient Classification

Other

Home

Recipient

Appointments

Bulk Registration

Reports

Vaccine Inventory

Person Account

Edit Questionnaire

Eligibility Status

Priority

Recipient Dose Status

Not Approved

Group 5

Registered

DETAILS

RELATED

* Account Name

Salutation

--None--

First Name

Edit

Middle Name

* Last Name

Questionnaire

Suffix

* Gender

Male

* Race

White

* Medical Health Conditions

* Birthdate

1/1/1994

* Ethnicity

Not Hispanic or Latino

Industry

Not Applicable

Do you identify as any of the following?


Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If you make an update that you did not mean to make, you can select the **UNDO** arrow to revert to the original value or click **CANCEL**.

Step 4 of 4: Confirm Updates




Home

Recipient

Appointments

Help & Information

 Person Account

Edit Questionnaire

Eligibility Status

Vaccine Group

Group 5

Recipient Dose Status

Registered

DETAILS

RELATED

Account Name

Edit Questionnaire

Gender

Male

Race

White

Employer

Vaccine Group

Group 5

Vaccination Status

Registered

Birthdate

1/1/1949

Ethnicity

Not Hispanic or Latino

Recipient Dose Status

Registered

The updated information will now show as part of the Recipient’s record.

Review the information that you entered to ensure it is correct.

Note that the information you update as part of the Recipient’s COVID-19 Vaccine Registration form will not trigger a re-calculation of the Recipient’s Vaccine Group.

You can manually reset the Vaccine Group using the same editing process as the previous slide.

- Audience
- Healthcare Provider

Healthcare Location Manager

Statewide Location Manager Profile

Tips

Any changes you make to a Recipient’s record will be reflected when the Recipient logs in to the COVID-19 Vaccine Portal.

Looking Up A Recipient Who Received Their First Dose Through a Long-Term Care Facility Partnering Pharmacy

Step 1 of 5: Navigate to the Recipient Tab

The federal government has an agreement with pharmacy partners (e.g., CVS, Walgreens) to vaccinate Long Term Care Facilities and Nursing Homes residents and staff. These pharmacy partners do not use CVMS, but instead upload their vaccination records directly to the CDC.

Even if a Recipient received their first dose through a pharmacy partner, they could receive their second dose from a healthcare provider enrolled in CVMS. To vaccinate them, you will have to locate and verify the first dose record before administering a second dose within CVMS.


Begin by navigating to the **RECIPIENT** tab from the CVMS Provider Portal Home Page.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Full name (required), ex: John Smith

Date of Birth (optional), MM/DD/YYYY

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group :	Recipient Dose Status	Email
------------	-----------	---------------	--------	-----------------	-----------------------	-------

Recipients from Long Term Care Facilities


First Name	Last Name	Date of Birth	Gender	Dose Number
------------	-----------	---------------	--------	-------------

No results, please search again.

Step 2 of 5: Search for the Recipient

To check for the Recipient’s record, search for them in the **RECIPIENT** tab.

- 1. Enter the Recipient’s **NAME** (first name and last name) in the search bar
- 2. To help narrow results, enter the Recipient’s **DATE OF BIRTH** in the appropriate field (Note: The **DATE OF BIRTH** field can only be used if there is a name in the search bar, and cannot be used by itself)
- 3. Click **SEARCH**



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

Q TestDemo

Optional Date of Birth

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group :	Recipient Dose Status	Email
Nicholas	TestDemo	Feb 24, 1989	Male	Group 1	Registered	

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
Nicholas	TestDemo	Feb 24, 1989	Male	1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

It’s possible that the Recipient has a result in both the **RECIPIENTS WITHIN CVMS** and the **RECIPIENTS FROM LONG TERM CARE FACILITIES** sections. The first record in the CVMS section means they were uploaded by an eligible organization.

The record in the second section means they received their first dose through a Pharmacy Partner.

Step 3 of 5: Search for the Recipient


- 1. Locate the **CORRECT** Recipient in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section of the search results
- 2. The Recipient may also appear as a search result in the **RECIPIENTS WITHIN CVMS** section. In that instance, note the **RECIPIENT DOSE STATUS** to see if CVMS has a record of the Recipient’s first dose
- 3. Click on the Recipient’s name in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section

Audience

Healthcare
Provider

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Location Manager

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Profile



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

TestDemo

Optional Date of Birth

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group :	Recipient Dose Status	Email
Nicholas	TestDemo	Feb 24, 1989	Male	Group 1	Registered	

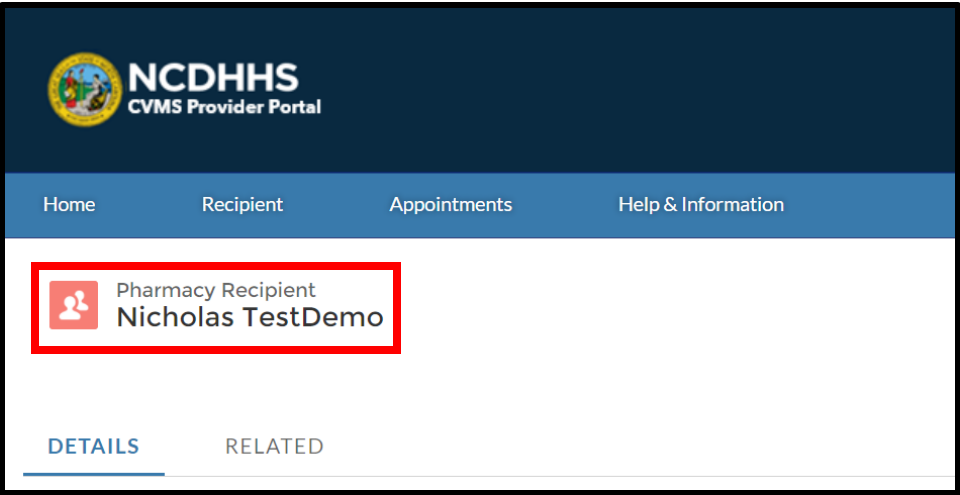
Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
Nicholas	TestDemo	Feb 24, 1989	Male	1

Step 4 of 5: View the Recipient's Pharmacy Record

Clicking the Recipient's name in the **RECIPIENTS FROM LONG TERM CARE FACILITIES** section will open the Recipient's **PHARMACY RECIPIENT** record. This record has no connection to a CVMS Recipient Record and is used only as reference data.

- 1. Scroll down in the **PHARMACY RECIPIENT** record to determine when the Recipient received their first dose
- 2. If the Recipient is eligible for their second dose, use the information in the **PHARMACY RECIPIENT** record to inform which COVID-19 vaccine product the Recipient should receive



Administration Details	
Vaccination Event ID	Dose Number
1.11000012362203E+16	1
VTckS provider PIN	Vaccine Manufacturer Name
079900	MOD
Administered at Location:type	CVX
Medical practice : family medicine	207
Administered at Location:name	NDC
79900	80777-0273-99
Administration address: street	Vaccine Lot Number
UNK	4LH35
Administration address: street 2	Vaccine Expiration Date
11 W Jones St	12/6/2021
Administration address: city	Vaccine Site of Administration
Raleigh	Right Thigh
Administration address: county	Vaccine Route of Administration
Wayne	Subcutaneous (SQ)
Administration address: zip code	Vaccination refusal
27601	
Administration address: state	
North Carolina	
Vaccination Administration Date	
1/12/2021	

Audience


- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

The **PHARMACY RECIPIENT** record will indicate which pharmacy administered the vaccine, as well as the Vaccine Manufacturer Name, date of vaccination, and other relevant information.

Step 5 of 5: Other Considerations

- 1. If the Recipient has no record in CVMS, refer to the **EXCEPTION 1** portion of this User Guide to create their CVMS Recipient record and register them on-site. Then follow the standard **APPOINTMENT WALK-IN** Booking process
- 2. If the Recipient has a record in CVMS, but is not registered, refer to the **EXCEPTION 2** portion of this User Guide to conduct on-site registration. Then follow the standard **APPOINTMENT WALK-IN** Booking process



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Help & Information

Create New Recipient

Hint: For quicker and more relevant search results, enter full name (ex: John Smith) and date of birth.

TestDemo

Optional Date of Birth

Search

Recipients within CVMS

First Name	Last Name	Date of Birth	Gender	Vaccine Group :	Recipient Dose Status	Email
Nicholas	TestDemo	Feb 24, 1989	Male			

Recipients from Long Term Care Facilities

First Name	Last Name	Date of Birth	Gender	Dose Number
Nicholas	TestDemo	Feb 24, 1989	Male	1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips


Keep a tab open with the **PHARMACY RECIPIENT** record when administering the second dose of the COVID-19 vaccine, since it will not appear in the **FIRST DOSE DETAILS** section of the Vaccine Administration details.

Cancelling an Existing Appointment

Step 1 of 5: Search for the Recipient

The process to cancel an existing appointment for a Recipient begins on the **APPOINTMENTS** tab.

- 1. Navigate to the **APPOINTMENTS** tab



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1
Jan 19, 21, 03:01 PM	Walkin Example Dose 2 Scheduled	00111942	Clinic ABC Loc 1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Please be sure to bookmark this site: <https://uat3-ncdhhs.cs32.force.com/vaccinerecipient>

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If a Recipient needs to change their appointment date, the Provider can cancel the appointment and re-book the appointment through the Appointment Walk-In tool, and the appointment date will update. The Provider cannot reschedule for a future date/time.

Step 2 of 5: Search for the Recipient


- 1. You can use the **SEARCH APPOINTMENTS** field to search for the Recipient by **NAME**
- 2. Set the **FROM** and **TO** fields to include the date of the appointment that needs to be cancelled (the field will default to the current date)
- 3. Click **SEARCH**

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



NCDHHS
CVMS Provider Portal


Home

Recipient

Appointments

Help & Information

Below list shows all Scheduled and Canceled appointments for your location. To cancel an appointment please search in below list, select the appointment, and click the "Cancel Appointment" button

 Appointments
All Appointments
2 items

Search Appointments

Search by Name, Location, Vaccine Status

From

2021-01-13

To

Status

--- None ---

Search

Reset

Cancel Appointment

<input type="checkbox"/>	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	Jan 13, 2021	3:58:33 PM	Som29 Mon29	1991-01-04	Clinic ABC Loc 1	Dose 1 Scheduled	New
<input type="checkbox"/>	Jan 13, 2021	3:59:21 PM	Walkin Example	1955-12-12	Clinic ABC Loc 1	Dose 1 Scheduled	New

Step 3 of 5: Confirm the Appointment to Cancel

After clicking search, the existing **APPOINTMENTS** will populate underneath the Appointments List View.

- 1. Locate the correct **RECIPIENT** who needs an appointment cancelled
- 2. Verify the Recipient's identity
- 3. Select the checkbox to the left of the Recipient's name
- 4. Select the **CANCEL APPOINTMENT** button

Audience

Healthcare
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Home

Recipient

Appointments

Help & Information

Below list shows all Scheduled and Canceled appointments for your location. To cancel an appointment please search in below list, select the appointment, and click the "Cancel Appointment" button

Appointments

All Appointments

2 items

Search Appointments

Search by Name, Location, Vaccine Status

From

2021-01-13

To

Status

--- None ---

Search

Reset

<input type="checkbox"/>	Date	Time	Recipient Name	DOB	Location	Vaccine Status	Status
<input type="checkbox"/>	Jan 13, 2021	3:58:33 PM	Som29 Mon29	1991-01-04	Clinic ABC Loc 1	Dose 1 Scheduled	New
<input checked="" type="checkbox"/>	Jan 13, 2021	3:59:21 PM	Walkin Example	1955-12-12	Clinic ABC Loc 1	Dose 1 Scheduled	New

Cancel Appointment

Step 4 of 5: Cancel the Appointment

Selecting the **CANCEL APPOINTMENT** button will initiate a pop-up window to appear on the screen.


- 1. Input a **CANCELLATION REASON**
- 2. Select the **CANCEL APPOINTMENT** button

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
Location Manager
Profile



HomeRecipient

Below list shows all Scheduled Appointments

Appointments
All Appointments
2 items

DATE	TIME	RECIPIENT NAME	DOB	PROVIDER LOCATION	CANCELLATION REASON
Jan 13, 2021	03:59 PM	Walkin Example	1955-12-12	Clinic ABC Loc 1	RECIPIENT CANCELLED

Close Window

Cancel Appointment


Cancel Appointment

Status
--- None ---

SearchReset

Step 5 of 5: Confirm the Appointment is Cancelled

The Recipient should no longer have their appointment booked. If the Recipient’s appointment was for today, the Recipient should no longer appear on the **TODAY’S APPOINTMENTS** tool.



Home

Recipient

Appointments

Help & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Jan 19, 21, 10:59 AM	Test-1.4 Scenario145 Dose 1 Scheduled	00112065	Clinic ABC Loc 1

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

View Appointment / Cancellation History

To view a record of a Recipient’s appointment history, navigate to the Recipient tab, locate the Recipient’s record, and select **RELATED** tab. The Recipient’s appointment records will appear. Selecting an appointment record will bring up the details of that appointment, including a **CANCELLATION REASON** if applicable.

Audience

Healthcare
Provider

Healthcare
Location Manager

Statewide
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Profile

Home

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Appointments

Help & Information

Person Account

Walkin Example

Eligibility Status

Approved

Priority

Phase 1a

Recipient Dose Status

Dose 1 Canceled

DETAILS

RELATED

Appointments (2)

Appointment	Date and Time of Vaccin...	Vaccine Status	Vaccine
00111719		Dose 1 Canceled	
00111716		Registered	

Home

Recipient

Appointments

Help & Information

DETAILS

RELATED

Account Name

Clinic ABC Loc 1

Contact Name

Walkin Example

Appointment DateTime

1/13/2021, 3:59 PM

Cancellation Reason

RECIPIENT CANCELLED

Vaccine Status

Dose 1 Canceled

Vaccine

Vaccine Inventory

Injection Site

Understanding How Recipient Vaccine Group is Determined

How the Vaccine Group is Determined

Find My Vaccine Group

YOU HAVE A
SPOT. TAKE YOUR
SHOT.



Para usar este sitio web en español, seleccione español en el desplegable de la esquina derecha superior.

Tested, safe and effective COVID-19 vaccines will help us get back in control of our lives and back to the people and places we love.

A free COVID-19 vaccine will be available to all who want it, but supplies will be limited at first. We want to make sure people are vaccinated as quickly and fairly as possible, starting with people who are more likely to get COVID-19 and those more likely to get dangerously sick from it.

Use this tool to find your vaccine group.

This survey will not collect any private health information. There is an option at the end to enter contact information if you would like to be notified when you are eligible for vaccination.

Next

Because early supply of the COVID-19 vaccine is limited, **North Carolina has implemented a risk-based prioritization approach** based on guidance from the National Academy of Medicine, the CDC's Advisory Committee Immunization Practice, and the NC Institute of Medicine.

The NC population is divided into multiple Vaccine Groups based on an individual's **OCCUPATION, AGE, and RISK LEVEL.**

When answering the COVID-19 Vaccine Registration form, the Recipient is directed to the **FIND MY GROUP** tool (<https://findmygroup.nc.gov>) to follow the prompts that will tell them their Vaccine Group.



NCDHHS

Find My Vaccine Group

English ▾

Based on your responses, you are in Group 3: Additional Frontline Essential Workers. You are currently eligible to get a vaccine based on North Carolina's COVID-19 Vaccination Plan.


However, not all vaccine providers may be ready to vaccinate your group yet. Find local vaccine providers at MySpot.nc.gov and contact providers to find out which groups they are currently vaccinating. Remember: you have a spot to take your shot. Vaccines will be available to all who want it, but supplies are currently limited. You may have to wait.

Visit YourSpotYourShot.nc.gov for more information about vaccines. **To receive updates about COVID-19 vaccinations, please provide your email address and/or phone number.**

Appendix

When the Recipient is NOT in an active Vaccine Group

When you verify **RECIPIENT'S VACCINE GROUP**, and the Recipient is **NOT** in an active Vaccine Group, you are still able to **CREATE THE APPOINTMENT BOOKING** and **ADMINISTER THE COVID-19 VACCINE**.



HomeRecipientAppointmentsSlot ManagementHelp & Information

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 09, 21, 05:01 AM	Test Tall Recipient-1 Dose 1 Scheduled	03045743	Clinic Location1
Mar 09, 21, 01:17 PM	Test6 NC EHR Dose 1 Scheduled	03045771	Clinic Location1
Mar 09, 21, 01:25 PM	Test7 NC EHR Dose 2 Scheduled	03045775	Clinic Location1

Appointment Walk-In

You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Name

Space Test

Date Of Birth

YYYY-MM-DD

Email

Search Email

Search

Search Results

Appointment Booking

Name	DOB	Email	Vaccine Group :	Vaccine Dose Status
Space t Test	1997-03-17	rohiniuat@mailinator.com	Group 4	Dose 1 Scheduled


Please be sure to bookmark this site: <https://uat-ncdhhs.cs33.force.com/VaccineProvider>

Audience

- Healthcare Provider
- Healthcare Location Manager
- Statewide Location Manager Profile

Tips

If the Recipient informs you that their health information is **NOT CORRECT**, ask the Recipient to **UPDATE** their information (e.g., responses to COVID-19 Vaccine Registration form) in the **COVID-19 VACCINE PORTAL**, or update the Recipient's COVID-19 Vaccine Registration form in the CVMS Provider Portal.





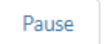


NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

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Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/1/2020	<ul style="list-style-type: none"> Initial document 		Azalea Troche
2	12/18/2020	<ul style="list-style-type: none"> Added Create Recipient, Register Recipient sections, updated Process Flow, added Generic Employer List, eligibility criteria 	7, 13-14, 15-37, 40	Steve DiGangi
3	1/15/2021	<ul style="list-style-type: none"> Updated instructions for Creating Recipient Updated Screenshots Updated instructions for Appointment Booking (select a location) Updated Understanding How Recipient Eligibility Status is Determined Section Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information Added "What to do if a Recipient received their first dose through a LTC/Pharmacy" section Added Cancelling an Existing Appointment Section 	1, 2, 13, 19, 23, 32, 35-40, 41-47	Steve DiGangi Courtney Seward
4	1/26/2021	<ul style="list-style-type: none"> Added in Updated Priority Group Tiering Logic Corrected Priority Tiering Screenshots Added screenshots to include Location Switcher button 	5, 9, 11-14, 24-25, 33-34, 37-38, 50	Steve DiGangi
5	2/9/2021	<ul style="list-style-type: none"> Added new section on Editing Recipient Registration Information Updated section titles in TOC 	35-39 3, 4, 8, 15, 26, 40, 46	Steve DiGangi
6	3/4/2021	<ul style="list-style-type: none"> Updated eligibility branding to Vaccine Group Updated COVID-19 Vaccine Portal branding to COVID-19 Vaccine Portal Removed priority tiering logic and eligibility visibility 	3, 5-7, 9-14, 17-24, 30-33, 37, 39, 41-43, 45, 53, 54, 56	Steve DiGangi
7	3/10/2021	<ul style="list-style-type: none"> Updated Overview slide Updated branding to include Recipient Check-In tool Updated Cancelling an Existing Appointment section 	5, 9, 14, 25, 34, 36, 47, 51, 56	Steve DiGangi